



Administer Contract Worker

HRIS 8.3

Revised January 2003

Administer Contract Worker HRIS 8.3

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Overview of HRIS Version 8.3

The HRIS Version 8 Tutorial and Navigation Course cover the basic version 8 terminology and functionality. This document will not cover specifics of what has already been covered by the on-line applications. Some basic shortcuts and terminology are listed in Appendix A and Appendix B.

Basic Procedures

Logging on to HRIS 8.3

The database name for production is HRPRD (same as 7.51; the name did not change).
The url for HRPRD is: <http://hrsrv.lbl.gov:8000/servlets/iclientservlet/HRPRD/?cmd=start&>

1. Using Internet Explorer, type “<http://HRIS.LBL.GOV/HRPRD>” in the URL, the login page will display
2. Enter your PeopleSoft Operator ID (ALL CAPS)
3. Enter your password (case sensitive)
4. The window opens to the Home page with your menu groups.

Changing your Password

Roadmap

[Home](#) > [PeopleTools](#) > [Maintain Security](#) > [Use](#) > My Profile

Procedure

1. Once you've logged into PeopleSoft
2. Follow the path: [Home](#) > [PeopleTools](#) > [Maintain Security](#) > [Use](#) > My Profile
3. Click on Change **Password link**
4. Enter your **current Password**, tab
5. Enter a **new Password** (Reminder: Case sensitive, LBL policy, etc), tab
6. Confirm the **new Password**
7. Click **OK**, then click the **Save** button
8. Go back to **Home** to exit the password pages

Access to Records, Data and Pages

All Contract Worker Processors are assigned the same "Role" as 'guest processors'. This role provides access to the parts of the system needed to do that job. All Guest and Contract Worker processors should have the same access to complete assigned duties.

You will all have:

1. Administer Guest - Lab wide access to guest and contract worker records only. Employee data may not be updated with this access role. Includes privileges to view and update Personal Data, Job Data, Emergency Contact, and Track Education. This access can do all actions except correction and update in the Identification Data pages.

Data Correction and End User Support

Correction of incorrect effective dated data should be sent to Payroll@lbl.gov. If you have access to change data then by all means.... Do it!

Duplicate ID numbers, value list changes, table, and any other squirrely problems should be sent to HRIS@lbl.gov

Dagny Miurduchann	x6588	Recruitment and Administer Guest/Contract Worker
Amy Lowe	x5044	Administer Workforce, Administer Training, and Plan Salaries
Angela Dawn	x7873	Value lists, Institution/School Tables, and Query Basics
Cynthia Coolahan	x6431	System Security and Access
Ben Ortega	x6326	Foreign Nationals, Visas, Citizenship, and Degree Verification
Mary Bishop	x5270	Policy and the RPM
Payroll	x6543	Data correction, pay issues, tax questions, PAF processing, etc.
Benefits	x6403	Health and Welfare questions, Benefit program eligibility

Functionality for users who are converting from version 7.51 to version 8.3

HRIS Version 8.3 functionality is basically the same as 7.51. An employee record has the same components and these components relate to one another in the same fashion.

Some data fields have moved to new page locations and some pages have moved to new component locations.

Some Important Changes are:

1. **Citizenship Status** is now on the Identification Data – Citizenship/Passport page and is updated by International Researcher and Scholars Office (IRSO).
2. **Gender** and **Highest Ed Level** are on the Personal Data – Personal Information page that is now effective dated, you must insert a row to edit.
3. **LBNL Directory** has moved to the Personal Data component.
4. **Name** is a calculated field, it combines the separate entries for First, Middle and Last name fields.
5. **Union Code** is on the Job Data – LBNL Miscellaneous page.
6. The “Calculate Compensation” button on the Compensation page populates the **Comp Rate**.
7. **Employment Data** and **Benefits Participation Program** components can only be access through the links on the Job Data component. In other words they are like sub-components of Job Data.

A complete listing of the Components and the fields on these Components is available in Appendix B.

Page Definitions

The following pages are description of the pages and the data available on those pages. Many fields are new in version 8 and they are not used. We have tried to minimize the customization to the PeopleSoft delivered application so you will notice that many items remain both on the menus, component list and the pages.

Please disregard items that are listed and 'Not Used'. Help us to minimize the customizations.

To get to specific pages and fields the following Roadmaps may be useful:

Personal Data (Address, Name, Highest Ed Level, Gender, Ethnicity)

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Personal Data

Job Data (Job Code, Empl_class, Comprate, etc.)

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Employment Data (Supervisor ID and Appt End Date)

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Emergency Contact

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Emergency Contact

Passport/Visa Data (Citizenship Status)

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Identification Data

Personal Data

Name History

This page is effective dated. Only Name Type: Primary is used here at Berkeley Lab. Name data is entered in separate fields for First, Middle, Last, and Suffix, the concatenated Name field is populated by clicking the “Refresh the Name Field” button. Laboratory guests, contract workers, and employees should update this page using the Employee self-service web site. Send corrections to payroll@lbl.gov

PEOPLE Soft

Home Home Help Sign Out

Home > Administer Workforce > Administer Workforce > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity LBNL Personal Data LBNL Directory

EmplID: 007020 Employee

Name Type First 1 of 1 Last

*Type of Name: Primary + -

Name History First 1 of 1 Last

*Effective Date: 08/03/2002 + -

Format Using: USA United States Refresh the Name Field

Person Name

Prefix: Middle: L

First: Lauren Last: Lowe Suffix:

Name: Lowe,Lauren L

Save Return to Search Next in List Previous in List Previous tab Next tab Refresh Update/Display Include History Correct History

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

Req	Field Name	Type	Description
*	Type of Name	VL	Must be “Primary”
*	Effective Date	DT	Enter Date of Hire or Date of name change
	Format Using	LU	Defaults to USA – do not edit
	Prefix	_	Not used – leave blank
*	First	_	Enter first name (case sensitive)
	Middle	_	Enter middle name or initial (case sensitive), No period (.)
*	Last	_	Enter last name (case sensitive)
	Suffix	LU	Select from value list if applicable
*	Name	_	Click the “Refresh the Name Field” button to populate

* Required Field

Address History

This page is effective dated. Only Address Type “Home” and “Mail” are used here at Berkeley Lab. Laboratory guests, contract workers and employees should update this page using the Employee self-service web site. Send corrections to payroll@lbl.gov

PEOPLE Soft

Home Help Sign Out

Home > Administer Workforce > Administer Workforce > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity LBNL Personal Data LBNL Directory

Lowe, Lauren L Employee EmpID: 007020

Address Type View All First 1 of 1 Last

*Address Type: HOME + -

Address History View All First 1 of 1 Last

*Effective Date: 08/03/2002 *Status: Active + -

Country: CAN Canada

Address 1: 1st Postal Code Check Street

Address 2:

Address 3:

Address 4:

City: Alberta

County:

Postal: A8H 7U8

Province: AB Alberta

Phones First 1 of 1 Last

*Phone Type Telephone

Home 510/258-9647 + -

Email Addresses First 1 of 1 Last

*Email Type *Email Address + -

Save Return to Search Next in List Previous in List Previous tab Next tab Refresh Update/Display Include History Correct History


[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

Req	Field Name	Type	Description
*	Address Type	VL	Must be “Home” or “Mail”, use value list. For Contract Worker: Home = Agency Name and Address
*	Effective Date	DT	Enter Date of Hire or Date of new address
	Status	VL	Defaults to “Active” – most recent effdt determines current
*	Country	LU	Enter Country Code, use lookup if necessary. Default: USA
*	Address 1:	—	Enter Agency Name
*	Address 2:	—	Enter Street Address, unit number ok here – no abbreviations
	Address 3:	—	Optional as needed
	Address 4	—	Optional as needed
*	City	—	Enter City name
	County	—	Not used
*	Postal	—	Enter zip code – format checking
	Province	LU	Not used
*	Phone Type	VL	Enter “Home”, use value list
*	Telephone	—	Enter home phone number for address above
	Email Type	VL	Not used
	Email Address	—	Not used here – email is on Guest Info for guests’ private accounts or LBNL Directory for lbl.gov accounts.

* Required Field

Personal History

Nothing on this page is required for Contract Workers – no edits are necessary.



[Home](#) [Help](#) [Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > **Personal Data** [New Window](#)

[Name History](#) [Address History](#) [Personal History](#) [Identity/Diversity](#) [LBNL Personal Data](#) [LBNL Directory](#)

Lowe, Lauren LEmployeeEmpID: 007020

Personal DataView AllFirst1 of 1Last

*Effective Date:08/03/2002

*Gender:Female

*Highest Education Level:D-Some College

Language Code:English

*Marital Status:Single

As of:08/03/2002

☐ Full-Time Student

+

-

[Save](#) [Return to Search](#) [Next in List](#) [Previous in List](#) [Previous tab](#) [Next tab](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

HRIS 8.3 Administer Guest

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Identity/Diversity

Nothing on this page is required for Contract Workers – no edits are necessary.

This page is not effective dated, to update simply edit the field and save the new data.

PEOPLE
Soft

Home Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity LBNL Personal Data LBNL Directory

Lowe, Lauren L Employee EmpID: 007020

Date of Birth: 07/10/1958 Birth Country: USA United States
 Age: Years 44 Months 2 State: CA California
 Date of Death: Birth Location: Berkeley
☐ Waive Data Protection Original Hire Date: 08/03/2002 USA

National ID View All First 1 of 1 Last

Country	National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	576859785	<input type="checkbox"/> <input type="button" value="+"/> <input type="button" value="-"/>

USA

Ethnic Group: White

Save Return to Search Next in List Previous in List Previous tab Next tab Update/Display Include Correct


[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

Req	Field Name	Type	Description
	Date of Birth	DT	Enter Birthdate (mm/dd/yyyy)
	Age	—	Auto calculated age data as of current date
	Date of Death	DT	Enter as necessary
	Birth Country	LU	Enter if known, use lookup – IRSO completes if data is known
	State	LU	Enter if known, use lookup – IRSO completes if data is known
	Birth Location	—	Enter if known, use lookup – IRSO completes if data is known
	Waive Date Protection	CB	Not used
	Original Hire Date	DT	Auto fills by system – date of first record in HRIS
	Country	—	Default: “USA”, view only
	National ID Type	—	Default: “PR”, view only
	Description	—	Default: “Social Security Number”, view only
**	National ID	—	Enter SS# if known, no field formatting. Data checked for valid # and duplicates.
	Primary ID	—	Default: “checked”, view only

** Enter SS# if known - is not required at this time.

Citizenship

This page is not effective dated, to update simply edit the field and save the new data.



HomeHelpSign Out

Home > Administer Workforce > Administer Guest > Use > HireNew Window

Name HistoryAddress HistoryPersonal HistoryIdentity/DiversityCitizenshipLBNL Personal Data

Lowe, Lauren LEmpID:View AllFirst1 of 1Last

*Country:USAUnited States

U.S. Citizenship Status:

SavePrevious tabNext tabRefreshAdd

Name History | Address History | Personal History | Identity/Diversity | Citizenship | LBNL Personal Data | LBNL Directory

Req	Field Name	Type	Description
*	Country	LU	Defaults to USA, Enter Country of citizenship if known. (IRSO will maintain this data as necessary)
*	U.S. Citizenship Status	VL	Enter Status for citizenship as it relates to USA.

* Required Field

LBNL Personal Data

Nothing on this page is required for Contract Workers – no edits are necessary.

The screenshot shows a web application interface for "PEOPLE Soft". The top navigation bar includes links for Home, Help, and Sign Out. The breadcrumb trail is: Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data. A "New Window" link is also present. Below the breadcrumb, there are tabs for Name History, Address History, Personal History, Identity/Diversity, LBNL Personal Data (which is selected), and LBNL Directory. The main content area displays the name "Lowe, Lauren L", the role "Employee", and the "EmpID: 007020". There are two checkboxes: "UC Student" and "Release Address?". A "Referral Comment:" label is followed by a text input field. At the bottom, there is a row of buttons: Save, Return to Search, Next in List, Previous in List, Previous tab, Next tab, Update/Display, and Inc. A "Refresh" button is also visible. At the very bottom, there is a row of links: Name History | Address History | Personal History | Identity/Diversity | LBNL Personal Data | LBNL Directory. A scrollbar is visible at the bottom of the page.

PEOPLE Soft

Home Help Sign Out

Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity LBNL Personal Data LBNL Directory

Lowe, Lauren L Employee EmpID: 007020

☐ UC Student ☐ Release Address?

Referral Comment:

Save Return to Search Next in List Previous in List Previous tab Next tab Update/Display Inc Refresh

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

LBNL Directory

Data on this page is Required. Enter Supervisor info if Contract Worker info is not available. Contact telephone services at tcs@lbl.gov for edit after hire is complete.

This page is not effective dated, to update simply edit the field and save the new data.


Req	Field Name	Type	Description
	Email ID	—	Autofilled/Updated by LBNL Postmaster, view only
*	Mail Drop ID	LU	Enter LBNL Mailstop, Use lookup .
	Phone Book Name	—	Display of name that will be listed in web directory. Save record to view final display format. Update in Name History or Nickname field.
	Published in Phonebook	CB	Default: unchecked. View only. Guests are not included in printed phone book. Contact tcs@lbl.gov for update.
	Hidden from Web Directory	CB	Default: unchecked. View only. Record will display on web directory, contact tcs@lbl.gov for update.
	Nickname	—	Enter alternate first name
	Nickname Code	VL	Enter desired action for nickname data. Append to add in parentheses to current name, replace to replace first name field value, blank for no display changes.
*	Location #	—	First office or lab location must be 1. Insert outer record row to have multiple office/lab locations.
*	Building	LU	Enter Bldg. number. Use lookup . Data checked.
*	Room	LU	Enter room number. Use lookup . Data checked.
*	Phones (type)	LU	First phone type must be 1- Work Phone 1, insert new row for Fax, Work Phone 2, Cell, etc.
*	Work Phone	-	Enter number, if LBNL extension number only enter the 4-digit extension, let system assign area code and prefix. If other number enter in phone format. Example:(415) 456-4657

* Required Field

Job Data

Work Location

This page is effective dated. Send corrections to payroll@lbl.gov, only the payroll department can correct data once it saved.



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[Work Location](#)
[Job Information](#)
[LBNL Miscellaneous](#)
[Compensation](#)
[GSRA Data](#)
[Dept Info](#)
[Purchase Order Info](#)

Lowe, Lauren L Employee EmpID: 007020

Work Location

First 1 of 1 Last

Employee Status: Active Date Created: 08/03/2002

Effective Date: 08/03/2002 Effective Sequence: 0

Action / Reason: Hire HIR New Hire

Regulatory Region: USA United States

Company: LBL Lawrence Berkeley Laboratory

Business Unit: STDBU LBNL Business Unit

Department: HR Human Resources Department Entry Date: 08/03/2002

Location: 0001 Berkeley

Supervisor ID: 294751 Lowe, Amy

Establishment ID: 01

[Job Data](#)
[Employment Data](#)
[Benefits Program Participation](#)

Save Return to Search Previous tab Next tab

Update/Display Include History Correct History


[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)

Req	Field Name	Type	Description
	Employee Status	—	Displays of active status of the data row
	Date Created	—	Displays the date when the row was entered (action date)
*	Effective Date	DT	Enter the date this data row is effective
*	Effective Sequence	—	Enter sequence of actions if multiple actions on same effdt
* / *	Action/Reason	VL	Enter Primary action code and Specific reason for the action, select from value lists.
	Regulatory Region	LU	Defaults to USA, do not change
	Company	—	Defaults to LBL, do not change
	Business Unit	LU	Defaults to STDBU, do not change
	Department	—	Leave blank, will auto fill from Dept Info tab
	Department Entry Date	DT	Leave blank, will auto fill from last update action in Dept Info
	Location	LU	Defaults to 0001, do not change – consult with payroll mgr. for changes
	Supervisor ID	LU	Leave blank, use custom field on Employment Data page
	Establishment ID	—	Defaults to 01, do not change

* Required Field

Job Information

This page is effective dated. Send corrections to payroll@lbl.gov, only the payroll department can correct data once it saved.



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Home > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > **Job Data** [New Window](#)

[Work Location](#)
[Job Information](#)
[LBNL Miscellaneous](#)
[Compensation](#)
[GSRA Data](#)
[Dept Info](#)
[Purchase Order Info](#)

Lowe, Lauren L Employee EmpID: 007020

Job Information

First 1 of 1 Last

Effective Date: 08/03/2002 Effective Sequence: 0

Action / Reason: Hire New Hire Current

*Job Code: 214.3 Graduate Student Research Asst Entry Date: 08/03/2002 Planned Exit: ☐ End Job Automatically

Supervisor Level:

*Regular/Temporary: Regular *Full/Part: Full-Time *Officer Code: Not Applicable

Empl Class: GSRA Shift Rate:

*Regular Shift: N/A FTE: 1.00

Standard Hours: 40.00

Work Period: W Weekly

[Job Data](#)
[Employment Data](#)
[Benefits Program Participation](#)

[Save](#)
[Return to Search](#)
[Previous tab](#)
[Next tab](#)
[Update/Display](#)
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[Work Location](#) |
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 [Dept Info](#) |
 [Purchase Order Info](#)


(Tip: Enter Job Code then Empl Class. Most fields will auto-fill. Then verify.)

Req	Field Name	Type	Description
*	Job Code	LU	Enter Job Code. Use lookup. Data checked.
	Entry Date	DT	Leave blank, will auto fill with date when job code changes
	Planned Exit	DT	Leave blank, not used.
	End Job Automatically	CB	Leave blank, not used.
	Supervisor Level	LU	Leave blank, not used.
	Regular/Temporary	VL	Auto fills from Empl Class entry. (Regular: positions with no end date, Temporary: positions with end date.)
	Full/Part	VL	Enter value, select from value list
*	Empl Class	VL	Enter value, select from value list
	Officer Code	VL	Not Used – Defaults to Not Applic.
	Regular Shift	VL	Defaults to N/A, not used in HRIS. Shift code is in LETS.
	Shift Rate	-	Defaults blank, do not change.
*	Standard Hours	—	Enter hours worked per week. 40=100%
	FTE	—	Calculates from standard hours (1.0 = 100% or 40 hrs/wk)
	Work Period	LU	Defaults to W – weekly, do not change, LBNL hours are weekly.

* **Required Field**

LBNL Miscellaneous

Nothing on this page is required for Contract Workers – no edits are necessary.



[Home](#) [Help](#) [Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > [Job Data](#) [New Window](#)

[Work Location](#) [Job Information](#) [LBNL Miscellaneous](#) [Compensation](#) [GSRA Data](#) [Dept Info](#) [Purchase Order Info](#)

Lowe, Lauren L Employee **EmplID:** 007020

LBNL Job Data First 1 of 1 Last

Employee Status: Active **Date Created:** 08/03/2002 + -

Effective Date: 08/03/2002 **Effective Sequence:** 0

Action / Reason: Hire HIR New Hire

Union Code: 99 Non Represented **HEERA Status:** Non-Superv

☐ Confidential Employee?

Job Requisition #:

Comment:

[Job Data](#) [Employment Data](#) [Benefits Program Participation](#)


[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#)

[Update/Display](#) [Include History](#) [Correct History](#)

[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)

Compensation

This page is effective dated. Send corrections to payroll@lbl.gov.



[Home](#)
[Help](#)
[Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > [Job Data](#)
[New Window](#)

[Work Location](#)
[Job Information](#)
[LBNL Miscellaneous](#)
[Payroll](#)
[Job Data Salplan](#)
[Compensation](#)
[GSRA Data](#)

Lowe, Angle A Employee EmplID: 8031

Compensation
[First](#)
[1 of 1](#)
[Last](#)

Effective Date: 10/02/2002 **Effective Sequence:** 0
Action / Reason: Hire New Hire [Current](#)

Compensation Rate: 5,500.000000 ***Frequency:** M Monthly

Comparative Information

Change Amount: 0.000000 USD Monthly **Compa-Ratio:** 0.92
Change Percent: 0.000

Pay Rates

Annual	66,000.000000	USD	Daily	253.846154	USD
Monthly	5,500.000000	USD	Hourly	31.730769	USD

Full Time Monthly Rate: 5,500.00

[Default Pay Components](#)
[Contract Change Prorate Option](#)

Pay Components
[First](#)
[1 of 1](#)
[Last](#)

[Amounts](#)
[Changes](#)
[Conversion](#)

*Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Percent
1 NAANL	0	Details	5,500.000000	USD	M	

[Calculate Compensation](#)

[Job Data](#)
[Employment Data](#)
[Benefits Program Participation](#)

[Save](#)
[Return to Search](#)
[Previous tab](#)
[Next tab](#)
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[Include History](#)
[Correct History](#)


[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Payroll](#) | [Job Data Salplan](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)

Req	Field Name	Type	Description
	Compensation Rate	—	Displays Hourly Rate for Contract Worker
*	Frequency	LU	Should be H for Contract Worker
	Comparative Information	-	Displays amount and percent changes in Compensation Rate for this row compared to the one before it.
	Pay Rates	-	Displays calculated Hourly, Daily, Monthly, and Annual rates for the Compensation Rate.
*	Rate Code	LU	Should be NAHRLY for Contract Worker
	Seq	—	Should be 0
	Details	link	Not used
*	Comp Rate	—	Enter Hourly Rate for Contract Worker. Click Calculate Compensation button to populate Comprate at top of page.
	Currency	LU	Not used
	Frequency	LU	Not used
	Percent	-	Not used

* **Required Field**

GSRA Data

Nothing on this page is required for Contract Workers – no edits are necessary.



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[Work Location](#) [Job Information](#) [LBNL Miscellaneous](#) [Compensation](#) [GSRA Data](#) [Dept Info](#) [Purchase Order Info](#)

Lowe, Lauren L Employee **EmplID:** 007020

GSRA Job Data [View All](#) First [1](#) of 1 [Last](#)

Employee Status: Active [+](#) [-](#)

***Effective Date:** [Calendar](#) **Current** **Effective Sequence:**

Action / Reason: [HIR](#) [New Hire](#) **ACTN DATE:** 08/03/2002

***Job Code:** [Search](#) Graduate Student Research Asst

% Time: **Std Hrs/Wk:**

Comp Rate:

Project ID: [Search](#)

Student ID:

Student Type: [Search](#)

GSRA Units: ☐ UC Safe Harbor Override

Hourly Rate: 16.805769
Monthly Rate: 2913.000
FT Mon Rt: 2913.00
Annual Rate: 34956.000

[Job Data](#) [Employment Data](#) [Benefits Program Participation](#)

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#) [Update/Display](#) [Include History](#) [Correct History](#)

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Dept Info

This page is effective dated. Send corrections to payroll@lbl.gov.

PEOPLE Soft

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Work Location Job Information LBNL Miscellaneous Compensation GSRA Data Dept Info Purchase Order Info

Lowe, Lauren L Employee EmplID: 007020

Job Data View All First 1 of 1 Last

Effective Date: 08/03/2002 Effective Sequence: 0

Action / Reason: Hire New Hire

Orgcode Info View All First 1 of 1 Last

Level 0: HR Human Resources

*Level 1: HR Human Resources

Level 2: IS HR Information Systems

Level 3:

Level 4:

☒ Primary Org Code

Job Data [Employment Data](#) [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

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Req	Field Name	Type	Description
	Level 0	—	Auto fills from selected Level 1, used for reporting when multiple divisions want to be grouped in one organization.
*	Level 1	LU	Enter Division/Department Code. Use lookup. Data checked.
	Level 2	LU	Enter Department/Group code. Use lookup. Data checked.
	Level 3	LU	Enter Group/Unit code. Use lookup. Data checked.
	Level 4	LU	Enter Level 4 code. Use lookup. Data checked.
	Primary Org Code	CB	Check for primary Level 1 only. One and only one orgcode row may be checked for a given job date row.

* Required Field

Insert multiple orgcode rows as needed. Max is usually only two, without repeating Level 1.

Purchase Order Info

This page is not used for Guests but is used for Contract Workers

PEOPLE Soft

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Work Location Job Information LBNL Miscellaneous Compensation GSRA Data Dept Info **Purchase Order Info**

Lowe, Lauren L Employee EmplID: 007020

Purchase Order Info View All First 1 of 1 Last

Employee Status: Active

Effective Date: 08/03/02 Current Effective Sequence: 0

Action: HIR Hire Action Date: 08/03/02

Reason Code: HIR New Hire

Purchase Order Number:

Special Rate: Guest Group:

Agency:

Contact:

Telephone:

Address:

Expiration Dt: Agency Surcharge:

Job Data [Employment Data](#) [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#) | [Purchase Order Info](#)


Req.	Field Name	Type	Description
*	Purchase Order Number	LU	Enter PO number. Use look up
	Special Rate	—	Enter rate if different from amount in comprate field on Compensation tab. Used for flat rate contracts only.
	Guest Group	LU	Enter if applicable. Use look up.
	Agency	—	Auto fills from PO entry
	Contact	—	Auto fills from PO entry
	Telephone	—	Auto fills from PO entry
	Address	—	Auto fills from PO entry
	Expiration Dt	—	Auto fills from PO entry
	Agency Surcharge	—	Auto fills from PO entry

* **Required Field**

Employment

Employment Data

This page is not effective dated with a customized effective dated scroll area. To update the non effective dated fields simply edit the field and save the new data. To update the effective dated area you must insert a row, edit the data to be correct, and save. Send correction to payroll@lbl.gov.


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Employment Data | **Employment Dta2** | LBNL Guest

Lowe, Lauren L Employee EmpID: 007020

Hire Date:	08/03/2002	Rehire Dt:		Termination Date:	
Company Seniority Date:	08/03/2002	Last Date Worked:			
Service Date / Months / Days:	08/03/2002	4 Expected Return Dt:			
Professional Exp Date:		Probation Date:			
Date Last Increase:	08/03/2002	Empl Rehire Date:			
Employee Hire Date:	08/03/2002	Adj BS Yr:			
Appt End Date:	12/02/2002				

Supervisor ID View All First 1 of 1 Last

*Effective Date:	08/03/2002	
Supervisor ID:	294751	Lowe, Amy
Business Title:	GSRA Test Business Title	

[Job Data](#) Employment Data [Benefits Program Participation](#)

Save Return to Search Previous tab Next tab Update/Display

[Employment Data](#) | [Employment Dta2](#) | [LBNL Guest](#)

Req.	Field Name	Type	Description
	Hire Date	—	Display only, Auto fills – date of ‘hire’ action in PS HRIS, all Empl_Class
	Rehire Date	—	Display only, Auto fills – date of last rehire action, all Empl_Class
	Termination Date	—	Display only, Auto fills – date of last termination action. Disappears when record is rehired.
	Company Seniority Date	DT	Auto fills on hire action, Edit manually for rehire action. – date of LBNL seniority. Used for RIF. Includes UC, LLNL, LANL service if there is not break in service. Not included: 50% time, LWOP >30 days, and Variable time. Periods with between 50% and 100% time are prorated. Complete worksheet to calculate.
	Last Date Worked	DT	Terminated records only. Enter date prior to effective date of termination action
	Service Date/Months/Days	DT	Auto fills on hire action, Edit manually for rehire action – date of UC service. Used for vacation accrual and service pin awards. Includes prior UC, LLNL, LANL or CA state employment. Not included: 50% time, LWOP >30 days, and Variable time. Complete worksheet to calculate.

* **Required Field**


Employment Data (continued)

Req.	Field Name	Type	Description
	Expected Return Dt	DT	Entered for persons on leave only. First date expected to be back at work.
	Professional Exp Date	DT	Not Used
	Probation Date	DT	Enter date for end of probation period for hire and rehire actions.
	Date Last Increase	DT	Auto fills – date of last comprate change.
	Employee Hire Date	DT	Auto fills – date of first hire as an employee
	Empl Rehire date	DT	Auto fills – date of last rehire as an employee
	Adj BS Yr	DT	Enter Adjusted BS Year. Complete worksheet to calculate.
*	Appt End Date	DT	Enter for all Guests/CW. Date when appointment expires.
*	Effective Date	DT	Enter date supervisor if assigned, hire date or other
*	Supervisor ID	LU	Enter Supervisor ID. Use look up
	Business Title	–	Optional, Auto fills Job Code Title from Applicant Hire process - Enter text if Business Title is different from Job Code Title.

* Required Field

Employment Dta 2

Nothing on this page is required for Contract Workers – no edits are necessary.



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Employment Data
Employment Dta2
LBNL Guest

Lowe, Lauren L
Employee
EmplID: 007020

☐ UC Executive Program?
☐ Principal Investigator Status
☐ Designated Official
☐ Prior UC Service?

☐ Accepted UCRP Waiver?

Waiver Date:

Faculty Stipend:
Student Program:
Survey Code:
Service Award Type:

PIN SignDt: 08/03/2002
Exp Grad Date:
Service Award Date:


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Save
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Nothing on this page is required for Contract Workers – no edits are necessary.



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[Employment Dta2](#)
[LBNL Guest](#)

Lowe, Lauren L
Employee
EmplID: 007020

Guest Class:
 Research
Phone:

Preparer:
 Lowe, Amy

Guest Email:

Reason of Visit:

From Date:

To Date:

Facility Used:
 Local Divisional Facilities

Income Support
[View All](#)
[First](#)
[1 of 1](#)
[Last](#)

Institution:
 University of California, Berkeley

☐ Employee of Institution?
Department:

Supplemental Funding Support
[View All](#)
[First](#)
[1 of 1](#)
[Last](#)

Inst/Fund:
 American Cancer Society
Type:
 Grant

Amount:

Start Date:

End Dt:

[Job Data](#)
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[Save](#)
[Return to Search](#)
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Benefit Program Participation

This page is not used for Guests or Contract Workers but the Benefit Program should be verified, it should be "NON".


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[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > [Job Data](#) New Window

Benefit Program Participation

Lowe, Lauren L Employee EmplID: 007020

Deductions Taken: Deduction Deduction Subset ID:

Benefit Status First 1 of 1 Last

Effective Date: 08/03/2002 **Effective Sequence:** 0

Action / Reason: Hire New Hire Current

***Benefits System:** Base Benefits ☒

Benefits Employee Status: Active

Annual Benefits Base Rate: \$4956.000 USD

Benefit Program Participation View All First 1 of 1 Last

***Effective Date** 08/03/2002

***Benefit Program** NON No Eligibility

Currency Code USD

[Job Data](#) [Employment Data](#) Benefits Program Participation

Save Return to Search Update/Display Include History Correct History

Req.	Field Name	Type	Description
	Benefits System	VL	Display only, default is Base Benefits
	Benefits Employee Status	—	Display only, active status of the job row
	Annual Benefits Base Rate	—	Calculated on at time of hire or rehire. Recalculated annually.
*	Effective Date	DT	Enter Date of Hire or change in Benefit Prog eligibility
*	Benefit Program	LU	Enter appropriate Program Code, For Guest and CW should be "NON"
	Currency Code	—	Defaults to US Dollars.

- **Required Field**

Be sure to **SAVE** your changes.

Historical Employees

Use this page to establish whether the person has an existing record in HRIS or Historical Only record.

PEOPLE Soft

Home Home ? Help Sign Out

Home > Administer Workforce > Administer Workforce Division > Use > Historical Employees [New Window](#)

Historical Employees

Historical Employees

003099 Silos, Lydia

SSN: 999-99-9999

Status: T Terminated

Empl Class: Z Guest

Job Code: 100.0

Hire Date: 06/22/2000 **Rehire Date:**

Term Date: 07/20/2000 **Date of Birth:** 09/09/1951

Address

Street: LBNL/CSEE
One Cyclotron Road

City/State/Zip: Berkeley CA 94720

Save Return to Search Next in List Previous in List

This page displays the most current row of data in the requested employee record. If there is a record in this page and the record cannot be called up using the Administer Workforce (GBL) access then the record is what we call 'Historical'.

Contract Worker Processors who do not have the Administer Workforce (GBL) access should use Administer Guest access to determine if you have access to the record. Contact HRIS@lbl.gov for clarification of a records' status if there is any question regarding a persons status. To rehire an existing employee as a Guest or Contract Worker fax the PGI form to Payroll@lbl.gov.

A Historical Only record means that the data was not loaded in HRIS and a new "Hire" action must be done in order to establish a new record for the person.

If the record exists in both the Historical Employees search page and in the Administer Workforce (GBL) access; then the record is currently in HRIS and a rehire or other action should be done.

Other Data Pages

Emergency Contact

– LBNL does not keep emergency contact for Contract Workers. The agency is contacted in the event of an emergency.

Identification Data

– LBNL does not keep Citizenship/Passport and Visa/Permit Data for Contract Workers. The contracting agency is required to maintain this data and to comply with the contract requirements.

Reports and Queries

Overview

HRIS 8.3 runs both reports and queries to web based applications. The output may be printed or saved to the user's desktop according to the output selected at the time the report or query is run.

SQR and Crystal – These are two primary Report types, SQR and Crystal. Both report types 'print' the output to Adobe Acrobat. Hardcopies can be reviewed and printed from there.

Queries – Always output to an html version of Excel. Users should use the .CSV format to save the query output to their desktop. This file should be opened with Excel – the data will automatically parse the data into the worksheet. Note: Data formats for numbers (including emplyd), date, time, and dollar values will need to be formatted. This version of query-excel does not impose standard formatting on the exported data fields. Tips on formatting output in Excel are included in this section.

How to Run a Report

Run Control ID

When you want to run a report or process, you need to tell the system when and where you want it to print. For most reports or processes, you also need to set parameters that determine the content of the report, such as the business unit or time period on which to report.

A run control is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create (and save) a run control with those settings. The next time you run the report, you select the run control, and the system fills in the settings.

A run control is created in "Add" mode and is saved when either the save button is pressed or when the selected report runs successfully. Once you create a run control id you should always use the same one.

How to Run an SQR Report

1. **Select the Report** you wish to run (update display mode)
2. Enter a **Run Control ID**
3. Enter **Parameters** or skip to step 4
4. Click the **"Run" button**
5. Select Server Name: **PSUNX**
6. Select Type: **Web**
7. Select Format: **PDF**
8. Click **OK**, the report will "process"
9. To view and print the report, Click the **Process Monitor link**
10. Click the **"Refresh" button** until the Run Status is **"Success"**
11. Click **Details link**
12. Click **View Log/Trace link**
13. Click the ***.pdf file link (the name will consist of the file name and run instance #)**
14. **View** and **print** report from Acrobat .pdf file

How to Run a Crystal Report

1. **Select the Report** you wish to run (update display mode)
2. Enter a **Run Control ID**
3. Enter **Parameters** or skip to step 4
4. Click the **“Run” button**
5. Select Server Name: **PSNT**
6. Select Type: **Web**
7. Select Format: **PDF**
8. Click **OK**, the report will “process”
9. To view and print the report, Click the **Process Monitor link**
10. Click the **“Refresh” button** until the Run Status is **“Success”**
11. Click **Details link**
12. Click **View Log/Trace link**
13. Click **the *.pdf file link (the name will consist of the file name and run instance #)**
14. **View and print** report from Acrobat .pdf file

How to Run a Public Query

Accessing the Query Manager

Roadmap

[Home](#) > [PeopleTools](#) > [Query Manager](#) > [Use](#) > Query Manager

How to Run an Existing Query without 'opening the query'

1. **Search for the Query** you wish to run
 - Enter a partial query title and click the Search button (use wildcard, see Appendix A)
 - Leave search criteria blank to view all available Queries
2. Click **Search button** to list available Queries
3. Click the **Run link** on the row for the title you wish to execute, a separate IE window will open to display the prompts and results.
4. Enter **Prompts if applicable** and Click the View Results button. If the query has no prompts your query results will be displayed.
5. Results will display in IE html page. Data can be viewed or downloaded to your desktop.
6. To download to Excel – **Use the “CSV Text File” link.** Do Not use the “Excel Spreadsheet” link.
 - *CSV Text File link* creates a simple text file that is automatically opened in Excel and easily formatted
 - *Excel Spreadsheet link* creates an excel file with very unfriendly formatting. Not recommended.
7. Save the CSV file to your desktop, rename if desired.
8. Double click the CSV file on your desktop and the file will open in Excel. Format the file as needed. See Query Excel formatting tips listed below.
9. To exit the query, Close the Query – Results IE window.
10. To run a new query, Activate the Query Manager IE window, it should still be open but minimized.

NOTE: A query must be “SAVED” before it will run. If you edit any part of a query you must first save it before running.

Tips on formatting your Query Output

- 1) When you first open the CSV file, always format the spreadsheet and save.
 - a) Select all cells in the spreadsheet using the top left cell. Hot Key: Ctrl-A
 - b) AutoFit the column width – Format, Column, AutoFit Selection. Hot Key: Alt-O,C,A
 - c) Left Justify all columns – click the Align Left tool bar button
 - d) Change the .CSV format of the spreadsheet - Save your CSV file, edit the “Save as type” to be Excel Workbook, Click OK.
- 2) Use Excel’s Format, Cells menu option to standardize field by column. Fields that we suggest formatting are: Numbers (including empid), Dates, and Time.

Data Entry and Maintenance Procedures

Overview

This document defines the specific LBNL procedures for processing Contract Worker Records in the HRIS database. Contract Worker records are important for site access, security information and divisional headcount type information to name a few. The appointment of contract worker status allows access the laboratory computer networks, building and parking facilities. Without active and current appointments a contract worker can loose one or all these privileges.

In this document we will review how to:

- ◆ Enter and change non-effective dated records including:
 - ⇒ Personal Data Information
 - ⇒ Extension of Appointment
- ◆ Enter and change effective dated records including:
 - ⇒ Name/Address
 - ⇒ Supervisor ID
 - ⇒ Hire
 - ⇒ Rehire
 - ⇒ Organization code
 - ⇒ Changing Job Code
 - ⇒ Termination
- ◆ Perform Historical ID Number searches to avoid duplicate records for the same person.

Personal Data: Name, Address, Personal Profile - Effective Dated

The Name, Address and Personal Profile pages contain name, institutional, local mailing address information. In version 8.3 this page is an effective dated record, to update you must insert a row, change data then save.

Roadmap

Home > Administer Workforce > Administer Guest > Use > Personal Data
--

Procedure

1. In the Administer Guest access, select **Use**.
2. Select **Personal Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **OK**, *The Address History page will display.*
5. Click the **tab** for the data you wish to update.
6. Click the **Insert Row (+)** button
7. Enter the **Effective Date** of the new data and update any fields as necessary.
8. Click **Save**.

Personal Data: Identity/Diversity or LBNL Directory–Effective Dated

The Identity/Diversity pages contain Birthdate and SS# information and LBNL Directory contains office location and phone information. These pages are single occurrence non-effective dated pages. To update data simply type over the data that is already in the field and save.

Roadmap

Home > Administer Workforce > Administer Guest > Use > Personal Data
--

Procedure

1. In the Administer Guest access, Click **Use**.
2. Click **Personal Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Address History page or list will display. If list, click the link for the record you wish to update.*
5. Click the **tab** for the data you wish to update.
6. **Edit** fields as necessary.
7. Click **Save**.

LBNL Supervisor ID: Effective Dated

The LBNL Contact for contract worker is stored in the Supervisor ID field. Supervisor ID is a special effective dated field on the Employment Data page. The Employment Data page is not effective dated but contains an effective date area for supervisor/host assignment.

Roadmap

Home > Administer Workforce > Administer Guest > Use > Job Data Link to Employment Data
--

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Job Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
5. The Work Location page will display, Click the **Employment Data link** at the bottom of the page. *The Employment Data page will display.*
6. Place your cursor in the **Effective Date** field just above the **SupervisorID** field and Click the **insert row (+)** button.
7. Update the **Effective Date** and **SupervisorID** fields on the row you just inserted, Tab out of the field. *The new Supervisor name will display.*
8. Click **Save**.

Extension of Appointment: Effective Dated

Extension of Appointment a single occurrence, non-effective dated field.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Link to [Employment Data](#)

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Job Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
5. The Work Location page will display, Click the **Employment Data link** at the bottom of the page. *The Employment Data page will display.*
6. **Update** the Appointment End Date.
7. Click **Save**.

Organization Codes: Effective Dated

Organization code is an effective-dated update. This means that you will need to insert a new record, update the information and save the information. The new row does not change the old information *it adds another layer duplicating the old information and must be changed before saving*. The old information will be saved as a history.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Job Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
5. Click **Insert Row (+)**, to create the new data row for update.
6. Update the **Effective Date**.
This date should reflect the exact effective date.
7. Update the **Action** and **Reason** fields, **(Transfer/REO)**
8. Click the **Department Info** tab, to go to the page for Orgcode update.
9. Click into the inner frame for the Org Code and change the **Level 1**, **Level 2**, and **Level 3** or **Level 4**, as required.
10. To insert a second organization code assignment, Click **Insert Row (+)** from within the Org code inner frame, a second occurrence of the org code fields will display for entry.
11. Click **Save**.

Historical Name Searches/Hiring/Rehiring Actions for a Contract Worker

In PeopleSoft, HIRE is the process of creating a record for a person for the first time in the system and REHIRE is the action to reactivate an existing record, which already exists in the system.

1. The HIRE process automatically puts you in ADD mode to create a new record.
2. ALWAYS do a **Historical Employee** search by name and partial name to determine if any other numbers exist for the person.
3. Never HIRE a Contract Worker who already has an existing record with a valid ID number. The existing record must be a termination action. The correct system action is REHIRE after the termination action.

NOTE: Valid ID numbers for HRIS records are 6-character numeric only.

1. **Any numbers starting with a “P” are old and invalid and must be evaluated.**
 - i) **Contract Worker ID numbers may not be changed because they exist in other systems (accounts payable, general ledger, time/labor distribution, etc.)**
 - ii) **Guest “P” number should be converted to a valid number before any actions are entered.**
2. **Multiple numbers for a person may constitute an invalid number situation. If a valid number exists for an individual use that ID number for your action.**
3. **Correction of invalid employee numbers or multiple records for any person are sent to hris@lbl.gov.**

Historical Employee Search Actions:

SITUATION	WHAT TO DO	SEND TO
New paperwork & only an Old P Number(s) exist where the person was only ever a "Contract Worker".	<ul style="list-style-type: none">• Enter a new record allowing the system to assign a new valid ID number.• Be sure all invalid numbers have been terminated.	<ul style="list-style-type: none">• File your paperwork.
New paperwork & only an Old P Number(s) exist where the person was only ever a "Guest".	<ul style="list-style-type: none">• The P number can be converted to a valid number.• Be sure all invalid numbers have been terminated.	<ul style="list-style-type: none">• Send email to hris@lbl.gov. We will convert the P number to a valid number and let you know when it is done.• You can then enter a "rehire" action.• File your paperwork.
New paperwork & invalid & valid numbers exist.	<ul style="list-style-type: none">• Update the valid number.• Be sure all records with invalid numbers have been terminated.	<ul style="list-style-type: none">• Send email to hris@lbl.gov• File your paperwork.
New paperwork to Hire or Rehire, but person is not in employee class "Z", so you cannot see the record with your Admin Guest access. The number is only visible in the historical search page.	<ul style="list-style-type: none">• Note the correct number and that the class needs to be made employee class "Z" for guest.	<ul style="list-style-type: none">• FAX the Participating Guest Info Form with the correct number, to the payroll department at FAX x4485. Payroll will do the rehire action and notify you when it is complete. Review the record for accuracy. Edit if you have access or send correction request to payroll@lbl.gov.

Investigating Historical ID Numbers

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Historical Employees

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Historical Employees**. *The Find an Existing Value page will display.*
3. Use the **name search fields** to find records with the requested name.
4. Click **Search**, *The Historical Employees page or list will display. If list, click the link for the record you wish to view.*
5. The Historical Employees data page displays for your review.
6. Use the **Next in List /Previous in List** to compare the data for like names.

Hiring a Contract Worker: Effective Dated

The hire process should only be started after the *Historical Number Search* has revealed that the person really does require a new record.

Roadmap

Home > Administer Workforce > Administer Guest > Use > Hire

Procedure

1. From the Administer Guest access, select **Use, Hire**.
The Add a New Value page displays.
2. Click, **Add** to let the system assign a number.
3. *The full Personal Data pages will be displayed for data entry.*
4. *Note: links at the bottom of the page to Job Data, Employment Data and Benefits Program Participation.*
5. **Enter** all required fields as listed on Page Definition section of this document.
6. Click **Save**.

Rehiring an Contract Worker: Effective Dated

The Rehire process is used when a record already exists as a Guest or Contract Worker. The Payroll Department must do the rehire action if the record is for an “employee” classification. Fax the PGI form to x 4485.

Always do a historical number search before a rehire action to validate that you are using the correct employee ID number. Identify any duplicate ID numbers and notify HRIS@lbi.gov if correction is necessary.

Roadmap

Home > Administer Workforce > Administer Guest > Use > Job Data

Procedure

1. In the Administer Guest access, Click **Use**. Click **Job Data**. *The Find an Existing Value page will display.*
2. **Enter the Employee ID** or use the name search fields.
3. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
4. On the Work Location page, Click **Insert Row (+)** button, to create a new data row for update.
5. Update the **Effective Date**.
This date should reflect the exact effective date.
6. Update the **Action** and **Reason** fields.
Action: Rehire and Reason: use value list
7. Update data for fields in Job Data, Employment Data and Benefits Program Participation components as necessary. See the Page Definition Section of this document. Click **Save**.
8. Go to the **Personal Data** pages and update data as necessary.
9. Select **Use, Personal Data**. Update data as necessary for fields listed the Page Definition Section of this document. Click, **Save**.

Terminating a Contract Worker: Effective Dated

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Guest](#) > [Use](#) > Job Data

Procedure

1. In the Administer Guest access, select **Use**.
2. Click **Job Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
5. Click **Insert Row (+)**, to create the new data row for update.
6. Update the **Effective Date**.
This date should reflect the exact effective date.
7. In the **Action** field, select **Terminatn**.
8. In the **Reason** field, select **EOA** (End of Guest/CW Assignment).
9. Click **Save**.

Using the Correction Action

The Correction mode is reserved for use on records requiring specific correction of data. Records may be correct in the current or the historical status.

Correction mode is to be used only for correction of data, not during the regular maintenance of records. This will increase the integrity of data.

If correction is made to any field in history, that same change must be made in all subsequent records.

Procedure

Request Correction of Contract Worker records via email to payroll@lbl.gov.

Questions? Contact hris@lbl.gov.

Appendix A

HRIS and PeopleSoft Terminology

Search Pages

Basic Search page:

The basic search page offers just one or two fields by which you may perform your search. However, you may designate which key field you would like to search by from the **Search By** drop-down list box.

Advanced Search page:

The advanced search page generally offers several keys by which you may search for your record. It allows you to narrow down your search by entering in more than one type of criteria.



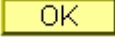
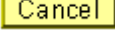
Using Wildcards

PeopleSoft applications support three wildcard features when searching for data. These wildcards can be helpful in finding the exact information you want to process. The following are the standard wildcard features.

% (percent sign)	Match one or more characters.
_ (underscore)	Match any single character.
\ (back slash)	Escape character—don't treat the next character as a wildcard.

For example, you can type a number string of possible employee names along with the % sign, such as S%,Frank and the system returns a list of those employees whose names match that criterion of last name starting with "S" and first name "Frank"



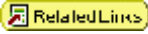


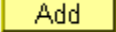




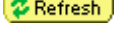




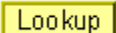
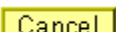
Buttons for Processing Transactions

Button	Name	Function
	Apply	Usually found on a page that you opened by clicking a prompt button. Enables you to apply the data input without returning you to the main page in case you want to perform additional searches.
	Run	Opens the Process Scheduler Request dialog box where you can set up your process control parameters for the current process.
	Okay	Accepts the data input made on an auxiliary page and returns you to the main page.
	Cancel	Clears the page and any data that you may have entered or changed without saving. When you click Cancel, the system doesn't warn you to save changes. Use Cancel if you entered data incorrectly and want to begin again.

More keyboard and link short cut continued on next page...

Short Cut or Hot Keys.

Hot keys perform an immediate action. When you press any of the key combinations below, the designated action occurs. You'll notice that several hot keys perform different functions depending on the page you are in, such as a transaction page or a search page.

Hot Key	Button or Link	Action
Alt+5		Opens lookup page.
		Opens the calendar prompt.
Alt+6	  	Opens the pop-up window on a page.
Alt+7	  	Inserts one or more rows in a grid or scroll area.
Alt+8	 	Deletes row in a grid or scroll area.
Alt+0		When in Expert Entry mode, validates data entered in page.
Alt+ .		Next in grid, scroll, or search page results list.
Alt+ ,		Previous in grid, scroll area, or search page results list.
Alt+ \	<u>Add a New Value</u>	Toggles between "Add a New Value" and "Find an Existing Value" in a Search page.
	<u>Find an Existing Value</u>	
Alt+ /	<u>Find</u>	Find data in grid or scroll area.
Alt+ '	<u>View All</u>	View all rows of data in grid, scroll area or search page results list.
Ctrl+ K	--	When in a search page or transaction page, opens a page with a list of keyboard navigation shortcuts using hot keys and access keys.
Enter		Activates the Okay button where appropriate.
		On a Search page, activates the search button.
		On a Lookup page, activates Lookup button.
Esc		Activates the cancel button where appropriate.

Appendix B

The Components and Tabs:

Component	Page (Tab)	Description	How Updated
Personal Data	Name History	Effective dated, contains first, middle, last name	Insert row
	Address History	Effective dated, contains home and mail address, home phone.	Insert row
	Personal Information	Effective dated, contains gender, highest ed. level	Insert row
	Identity/Diversity	Not effective dated, contains birthdate, ss#, ethnicity code	Edit/save
	LBNL Personal Data	Not effective dated, contains release address and UC student checkbox	Edit/save
	LBNL Directory	Not effective dated, contains mailstop, bldg., room, workphone	Edit/save
Job Data	Work Location	Effective dated, contains effective date, action, reason, work location	PAF or payroll
	Job Information	Effective dated, contains Job code, empl class, std hrs, full/pt time, etc.	PAF or payroll
	LBNL Miscellaneous	Effective dated, contains union code, confidential, HEERA status, comments	PAF or payroll
	Payroll	Effective dated, contains FICA status, paygroup, etc.	PAF or payroll
	Job Data Salplan	Effective dated, contains salary grade	PAF or payroll
	Compensation	Effective dated, contains comrate, calculated hrly, mthly, annual rates	PAF or payroll
	GSRA Data	Effective dated, contains summary GSRA data, student id, student type, units. GSRA only.	PAF or payroll
	Dept Info	Effective dated, contains Level 0, 1, 2, 3, 4 Orgcode data	PAF or Div Orgcode Data page
	Purchase Order Info	Effective dated contains PO info. Used for contract workers only.	PAF or payroll

Continues on next page....

The Components and Tabs (continued)...

Component	Page (Tab)	Description	How Updated
Employment Data	Employment Data	Not effective dated, contains dates primary actions, service, seniority, appt end date, supervisor id and business title.	Edit/save or Insert row
	Employment Dta2	Not effective dated, contains PI status, Designated Official, Service Award type and date, etc.	Edit/save
	LBNL Guest	Not effective dated, contains Guest appointment information. Used for guests only.	Edit/save
Benefits Program Particip	Benefits Progr Particip	Effective dated contains benefit program and date.	Insert row
Identification Data	Citizenship/Passport	Multiple data rows, contains US Citizenship Status, Passport data, County of Citizenship.	Insert Row or Edit/save. Updated by IRSO only
	Visa/Permit Data	Effective dated contains Visa data.	Insert Row. Updated by IRSO only
	Visa Comments	Effective dated contains Visa data.	Updated by IRSO only
Emergency Contact	Contact Address/Phone	Multiple data rows, contains name and address for emerg contacts	Insert Row or Edit/save
	Other Phone Numbers	Multiple data rows, contains phone contact info for emerg contacts	Insert Row or Edit/save
Track Education	Track Education	Multiple data rows, contains degree, major, school, date, verified	Insert Row or Edit/save.